Assignment Manager

Summary:

Assignment manager was constructed using the Siebel Vanilla "Service Request" Assignment Object. Some workflow columns and assignment attributes were created to allow assignment manager to utilize the custom fields that were developed to meet client's case tracking needs. Assignment rules and criteria were created to instruct the system how to compare an unassigned case to the list of Ombudsman specialists. Workload rules were created to set the maximum number of open cases a specialist may have.

Employees (candidates for assignment) were associated with specific assignment rules. Cases are assigned to an employee based on total scores that potential assignees are awarded during the assignment process. Candidates receive points for each criteria of an assignment rule they meet, while the number of open cases assigned to a candidate negatively affects the candidates total score. This strategy ensures that, among the most qualified candidates to which a case could be assigned, the one with the lightest load of open cases will receive the case. Points are also associated with the assignment rules themselves. The number of points given to a particular rule will determine the priority with which Assignment Manager will compare the rule to the case. If the criteria of the highest priority assignment rule are met, the case will be assigned based on that rule.

Assignment Rules:

Referred By : This is the primary assignment rule and was given a rule score of 160, the highest rule score that was configured in OCTS 2.0, to assure that assignment manager processes this rule first and with the highest priority. The rule states that a case with a "referred by" value of "White House" or "Congressional Office" or "Secretary's Office" will be assigned to Joyce DeMoss (as of 08/08/00).

The remainder of the rules are based upon the loan servicing agent:

Servicing Agent - "Unknown": The client expressed concern that new cases often have the incorrect servicing agent listed. Since assignment manager will rely upon the "servicing agent" field to determine an appropriate owner of the case, this information must be entered correctly, or the value of "unknown" must be selected until such time as NSLDS data is available on a regular basis. This is an important training point: if the intake specialist is not confident that the correct servicing agent has been provided, then "unknown" should be selected. Any case with an "unknown" servicer will be assigned to Joyce DeMoss (as of 08/08/00) so that the appropriate servicing agent can be determined and the case can then be assigned to the correct group.

Servicing Agent – "DCS": The case will be assigned to a member of the DCS team. Team members may not have more than 25 open cases at a time. A case will be assigned to the team member with the least number of open cases. If all team members have a maximum work load, then the case should be assigned to the DCS team lead. Two rules were required to meet this requirement. The first rule assigns the case to the team member who has the least number of open cases and has a rule score of 100 points. If all of the team members have reached the maximum work load, then none of the employees associated with this rule will be eligible to receive the case and will not receive the 100 points for the

rule. The second rule will assign the case to the DCS manager. The manager listed as an employee for this rule will always receive 90 points

> DCS team members (as of 08/08/00):
>> Velencia Ahmad
>> Ann Curry
>> Lula Lewis
>> Lou Palowiak
>> Veardean Wilson
>> Martha Windsor (Team Lead)

<u>Servicing Agent – "Direct Loans", loan type **NOT** "Direct Consolidation"</u>: The case will be assigned to a member of the DL Consolidation team. Team members may not have more than 25 open cases at a time. A case will be assigned to the team member with the least number of open cases. If all team members have a maximum work load, then the case should be assigned to the DCS team lead.

<u>Servicing Agent – "Direct Loans", loan type - "Direct Consolidation"</u>: The case will be assigned to a member of the DL Consolidation team, specifically Lisa Howell.

<u>Servicing Agent – not "DCS," "DL," "Unknown"</u>: The case will be assigned to a member of the NCS team. Team members may not have more than 25 open cases at a time. A case will be assigned to the team member with the least number of open cases. If all team members have a maximum work load, then the case should be assigned to Joyce DeMoss.